

Flame Retardants Market by Type (Aluminum Trihydrate, Antimony Oxide, Brominated), Application (Epoxy, Polyolefin, Unsaturated Polyester), End-Use Industry (Building & Construction, Electronics & Appliances), and Region - Global Forecast to 2028

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Abstracts

In terms of value, the flame retardants market is estimated to grow from USD 7.0 billion in 2022 to USD 9.5 billion by 2028, at a CAGR of 5.2%. Government regulations and safety standards often require the use of flame retardants in various products to minimize fire risks. As fire safety regulations become stricter or are more rigorously enforced, the demand for flame retardants can increase. High-profile fire disasters may increase public awareness of the need for fire safety, increasing the market for consumer products made of flame retardant materials. All these factors drive the market for flame retardants across the globe.

“Phosphorus was the second largest type of the flame retardants, in terms of value, during the forecast period.”

The demand for phosphorus flame retardants has been increasing in recent years, primarily due to growing concerns about the environmental and health impacts of traditional brominated flame retardants and halogenated compounds. Phosphorus-based flame retardants offer several advantages that make them increasingly popular. Phosphorus flame retardants are generally considered to be less harmful to the environment and human health compared to some traditional halogenated flame retardants, which may release toxic byproducts when they burn.

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“Cosmetics is expected to be the second fastest-growing end-use industry of the flame retardants market, in terms of value, during the forecast period.”

As consumers become more environmentally conscious, there is a preference for natural and sustainable skincare ingredients. Flame retardants reinforces the skin's natural barrier, helping to keep it healthy and resilient. Additionally, it can help with moisture barrier repair for the skin, especially when used in skincare products for dry or injured skin. The demand for flame retardants in cosmetics and skincare is driven by its natural and beneficial properties, its compatibility with various skin types, and consumer preferences for sustainable and effective ingredients.

“Asia Pacific is projected to be the fastest growing region, in terms of value, during the forecast period in the flame retardants market.”

Asia Pacific is known for its low cost of labor, easy availability of raw materials, increase in adoption of modern technologies, innovations, and easy availability of inexpensive lands, which makes it the global hub for manufacturing. The increasing population in countries like India and China, drives the demand for cosmetics, food and pharmaceutical products. Asia Pacific's pharmaceutical industry is growing and actively involved in research and development. Flame retardants is used in pharmaceutical applications, including as an adjuvant in vaccines, which may contribute to its demand. Also factors such as rising middle class population, demand for vegan and cruelty-free products and health and wellness trends fuels the demand for flame retardants in this region.

By Company Type: Tier 1 - 69%, Tier 2 - 23%, and Tier 3 - 8%

By Designation: C-Level - 23%, Director Level - 37%, and Others - 40%

By Region: North America - 32%, Europe - 21%, Asia Pacific - 28%, Middle East

& Africa - 12%, South America – 7%

The key players profiled in the report include Amyris, Inc (US), SOPHIM (France), Merck KGaA (Germany), Kishimoto Special Liver Oil Co., Ltd. (Japan), Empresa Figueirense De Pesca (Portugal), Arbee (India), Cibus (US), Otto Chemie Pvt. Ltd. (India), Arista Industries (US), and Oleicfat s.l. (Spain).

Research Coverage

This report segments the market for flame retardants based on source, end-use industry, and region and provides estimations of volume (ton) and value (USD thousand) for the overall market size across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, services, key strategies, associated with the market for flame retardants.

Reasons to Buy this Report

This research report is focused on various levels of analysis — industry analysis (industry trends), market share analysis of top players, and company profiles, which together provide an overall view on the competitive landscape; emerging and high-growth segments of the flame retardants market; high-growth regions; and market drivers, restraints, and opportunities.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on flame retardants offered by top players in the global market

Analysis of key drives: (Increasing demand for cosmetic products, beneficial for human health, rising popularity in nutraceuticals, and growth in R&D activities in pharmaceutical industry), restraints (Consumer skepticism about animal-sourced products and limitations

on shark fishing), opportunities (new renewable sources for production), and challenges (fluctuating costs of raw materials) influencing the growth of flame retardants market.

Product Development/Innovation: Detailed insights on upcoming technologies,

research & development activities, and new product & service launches in the flame retardants market

Market Development: Comprehensive information about lucrative emerging markets — the report analyzes the markets for flame retardants across regions

Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global flame retardants market

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the flame retardants market

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 FLAME RETARDANTS MARKET: INCLUSIONS AND EXCLUSIONS

1.3.1 FLAME RETARDANTS MARKET DEFINITION AND INCLUSIONS, BY TYPE

1.3.2 FLAME RETARDANTS MARKET DEFINITION AND INCLUSIONS, BY APPLICATION

1.3.3 FLAME RETARDANTS MARKET DEFINITION AND INCLUSIONS, BY END-USE INDUSTRY

1.4 MARKET SCOPE

FIGURE 1 FLAME RETARDANTS MARKET SEGMENTATION

1.4.1 REGIONS COVERED

1.4.2 YEARS CONSIDERED

1.5 CURRENCY CONSIDERED

1.6 UNITS CONSIDERED

1.7 STAKEHOLDERS

1.8 SUMMARY OF CHANGES

1.8.1 IMPACT OF RECESSION

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 FLAME RETARDANTS MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.2 PRIMARY DATA

2.1.2.1 Primary interviews—demand and supply sides

2.1.2.2 Key industry insights

2.1.2.3 Breakdown of primary interviews

2.2 MARKET SIZE ESTIMATION

2.2.1 BOTTOM-UP APPROACH

FIGURE 3 MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 1 (SUPPLY SIDE) - COLLECTIVE SHARE OF TOP PLAYERS

FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 2 (SUPPLY SIDE) - COLLECTIVE REVENUE OF ALL PRODUCTS

FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 3 (DEMAND SIDE) - DEMAND IN END-USE INDUSTRIES AND THEIR AVERAGE SELLING PRICE

2.2.2 TOP-DOWN APPROACH

FIGURE 6 MARKET SIZE ESTIMATION METHODOLOGY: APPROACH 4 (TOP DOWN)

2.3 DATA TRIANGULATION

FIGURE 7 FLAME RETARDANTS MARKET: DATA TRIANGULATION

2.4 GROWTH RATE ASSUMPTIONS

2.4.1 SUPPLY SIDE

FIGURE 8 MARKET GROWTH PROJECTION FROM SUPPLY SIDE

2.4.2 DEMAND SIDE

FIGURE 9 MARKET GROWTH PROJECTION FROM DEMAND SIDE: DRIVERS AND OPPORTUNITIES

2.5 IMPACT OF RECESSION

2.6 FACTOR ANALYSIS

2.7 ASSUMPTIONS

2.8 LIMITATIONS

2.9 RISK ASSESSMENT

2.9.1 FLAME RETARDANTS MARKET: RISK ASSESSMENT

3 EXECUTIVE SUMMARY

FIGURE 10 BUILDING & CONSTRUCTION END-USE INDUSTRY LED FLAME RETARDANTS MARKET IN 2022

FIGURE 11 POLYOLEFIN TO BE FASTEST-GROWING APPLICATION DURING FORECAST PERIOD

FIGURE 12 PHOSPHOROUS FLAME RETARDANTS TO LEAD MARKET BETWEEN 2023 AND 2028

FIGURE 13 ASIA PACIFIC ACCOUNTED FOR LARGEST MARKET SHARE IN 2022

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN FLAME RETARDANTS MARKET

FIGURE 14 GROWING ELECTRONICS & APPLIANCES INDUSTRY TO DRIVE FLAME RETARDANTS MARKET DURING FORECAST PERIOD

4.2 FLAME RETARDANTS MARKET SIZE, BY REGION

FIGURE 15 ASIA PACIFIC TO BE LARGEST MARKET FOR FLAME RETARDANTS DURING FORECAST PERIOD

4.3 ASIA PACIFIC: FLAME RETARDANTS MARKET, BY END-USE INDUSTRY AND COUNTRY, 2022

FIGURE 16 CHINA ACCOUNTED FOR LARGEST SHARE OF FLAME RETARDANTS MARKET IN ASIA PACIFIC

4.4 FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY

FIGURE 17 BUILDING & CONSTRUCTION TO BE LARGEST END USER OF FLAME RETARDANTS DURING FORECAST PERIOD

4.5 FLAME RETARDANTS MARKET SIZE, TYPE VS. REGION

FIGURE 18 ALUMINUM TRIHYDRATE LED FLAME RETARDANTS IN ALL REGIONS

4.6 FLAME RETARDANTS MARKET, BY KEY COUNTRIES

FIGURE 19 INDIA AND CHINA TO REGISTER HIGHEST CAGR DURING FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 20 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN FLAME RETARDANTS MARKET

5.2.1 DRIVERS

5.2.1.1 Increasing number of fire accidents

FIGURE 21 NUMBER OF FIRE ACCIDENTS REPORTED GLOBALLY, 2012–2021

5.2.1.2 Strict fire safety guidelines

TABLE 1 CODES OF NATIONAL FIRE PROTECTION ASSOCIATION (NFPA)

5.2.1.3 Growth of end-use industries

5.2.2 RESTRAINTS

5.2.2.1 Stringent regulations regarding use of conventional flame retardants

5.2.2.2 High loading levels of mineral-based flame retardants altering properties of final products

5.2.2.3 Use of harmful chemicals in flame retardants

5.2.2.4 High cost of raw materials

5.2.3 OPPORTUNITIES

5.2.3.1 Development of more effective synergist compounds

5.2.3.2 Rising demand for wires and cables

5.2.4 CHALLENGES

5.2.4.1 Supply challenges from Asia Pacific

5.2.4.2 Growing emphasis on environmental protection and sustainability

5.3 PORTER'S FIVE FORCES ANALYSIS

FIGURE 22 FLAME RETARDANTS MARKET: PORTER'S FIVE FORCES ANALYSIS

5.3.1 THREAT OF SUBSTITUTES

5.3.2 BARGAINING POWER OF SUPPLIERS

5.3.3 BARGAINING POWER OF BUYERS

5.3.4 THREAT OF NEW ENTRANTS

5.3.5 INTENSITY OF COMPETITIVE RIVALRY

TABLE 2 FLAME RETARDANTS MARKET: PORTER'S FIVE FORCES ANALYSIS

5.4 MACROECONOMIC INDICATORS

5.4.1 GDP TRENDS AND FORECAST

TABLE 3 GDP TRENDS AND FORECAST, BY MAJOR ECONOMIES, 2021–2028
(USD BILLION)

6 INDUSTRY TRENDS

6.1 SUPPLY CHAIN ANALYSIS

FIGURE 23 FLAME RETARDANTS MARKET: SUPPLY CHAIN

6.1.1 RAW MATERIALS

6.1.2 FLAME RETARDANT MANUFACTURERS

6.1.3 DISTRIBUTION NETWORK

6.1.4 END-USE INDUSTRY

6.2 KEY STAKEHOLDERS & BUYING CRITERIA

6.2.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 24 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP 3
END-USE INDUSTRIES

TABLE 4 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP 3 END-
USE INDUSTRIES (%)

6.2.2 BUYING CRITERIA

FIGURE 25 KEY BUYING CRITERIA FOR TOP 3 END-USE INDUSTRIES

TABLE 5 KEY BUYING CRITERIA FOR TOP 3 END-USE INDUSTRIES

6.3 PRICING ANALYSIS

6.3.1 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY END-USE
INDUSTRY

FIGURE 26 AVERAGE SELLING PRICE TREND OF KEY PLAYERS FOR TOP
THREE END-USE INDUSTRIES

TABLE 6 AVERAGE SELLING PRICE TREND OF KEY PLAYERS FOR TOP THREE
END-USE INDUSTRIES (USD/KG)

6.3.2 AVERAGE SELLING PRICE TREND, BY REGION

FIGURE 27 AVERAGE SELLING PRICE OF FLAME RETARDANTS, BY REGION,
2021–2028 (USD/KG)

TABLE 7 AVERAGE SELLING PRICE TREND OF FLAME RETARDANTS, BY
REGION, 2021–2028 (USD/KG)

6.4 TRENDS & DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

- 6.4.1 REVENUE SHIFT & REVENUE POCKETS IN FLAME RETARDANTS MARKET
- 6.5 FLAME RETARDANTS MARKET: ECOSYSTEM ANALYSIS
 - TABLE 8 FLAME RETARDANTS MARKET: ROLE IN ECOSYSTEM
 - FIGURE 28 FLAME RETARDANTS MARKET: ECOSYSTEM MAPPING
- 6.6 TECHNOLOGY ANALYSIS
- 6.7 CASE STUDY ANALYSIS
 - 6.7.1 A CASE STUDY ON FLOAT SWITCH OF RTP COMPANY
 - 6.7.2 A CASE STUDY ON SUSTAINABLE FILMS AND SHEETS
- 6.8 TRADE DATA STATISTICS
 - 6.8.1 IMPORT SCENARIO OF FLAME RETARDANTS
 - FIGURE 29 IMPORT OF FLAME RETARDANTS, BY KEY COUNTRIES (2017–2021)
 - TABLE 9 IMPORT OF FLAME RETARDANTS, BY REGION, 2017–2021 (USD MILLION)
 - 6.8.2 EXPORT SCENARIO OF FLAME RETARDANTS
 - FIGURE 30 EXPORT OF FLAME RETARDANTS, BY KEY COUNTRIES (2017–2021)
 - TABLE 10 EXPORT OF FLAME RETARDANTS, BY REGION, 2017–2021 (USD MILLION)
- 6.9 KEY CONFERENCES & EVENTS IN 2023–2024
 - TABLE 11 FLAME RETARDANTS MARKET: DETAILED LIST OF CONFERENCES & EVENTS
- 6.10 REGULATORY LANDSCAPE
 - 6.10.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
 - TABLE 12 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
 - TABLE 13 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
 - TABLE 14 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS
 - 6.10.2 REGULATIONS FOR FLAME RETARDANTS
 - 6.10.2.1 US
 - 6.10.2.2 Europe
 - 6.10.2.3 India
 - 6.10.2.4 China
- 6.11 PATENT ANALYSIS
 - 6.11.1 APPROACH
 - 6.11.2 DOCUMENT TYPE
 - TABLE 15 GRANTED PATENTS ACCOUNT FOR MORE THAN 10% OF ALL PATENTS

FIGURE 31 PATENTS REGISTERED FOR FLAME RETARDANTS MARKET, 2012–2022

FIGURE 32 PATENT PUBLICATION TRENDS FOR FLAME RETARDANTS, 2012–2022

FIGURE 33 LEGAL STATUS OF PATENTS

6.11.3 JURISDICTION ANALYSIS

FIGURE 34 MAXIMUM PATENTS FILED BY COMPANIES IN CHINA

6.11.4 TOP APPLICANTS

FIGURE 35 BASF SE REGISTERED MAXIMUM NUMBER OF PATENTS BETWEEN 2012 AND 2022

TABLE 16 LIST OF RECENT PATENTS BY BASF SE

TABLE 17 LIST OF RECENT PATENTS BY DOW GLOBAL TECHNOLOGIES LLC

TABLE 18 LIST OF RECENT PATENTS BY ADEKA CORPORATION

TABLE 19 TOP 10 PATENT OWNERS IN US, 2012–2022

7 FLAME RETARDANTS MARKET, BY TYPE

7.1 INTRODUCTION

FIGURE 36 PHOSPHORUS TO ACCOUNT FOR LARGEST MARKET SHARE DURING FORECAST PERIOD

TABLE 20 FLAME RETARDANTS MARKET, BY TYPE, 2017–2021 (KILOTON)

TABLE 21 FLAME RETARDANTS MARKET, BY TYPE, 2022–2028 (KILOTON)

TABLE 22 FLAME RETARDANTS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 23 FLAME RETARDANTS MARKET, BY TYPE, 2022–2028 (USD MILLION)

7.2 ALUMINUM TRIHYDRATE (ATH)

7.2.1 RAPID DEVELOPMENT OF INFRASTRUCTURE TO DRIVE MARKET

TABLE 24 ALUMINUM TRIHYDRATE: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (KILOTON)

TABLE 25 ALUMINUM TRIHYDRATE: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (KILOTON)

TABLE 26 ALUMINUM TRIHYDRATE: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 27 ALUMINUM TRIHYDRATE: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (USD MILLION)

7.3 ANTIMONY OXIDE

7.3.1 NEED TO ACHIEVE FIRE SAFETY STANDARDS TO DRIVE MARKET

TABLE 28 ANTIMONY OXIDE: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (KILOTON)

TABLE 29 ANTIMONY OXIDE: FLAME RETARDANTS MARKET, BY REGION,

2022–2028 (KILOTON)

TABLE 30 ANTIMONY OXIDE: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 31 ANTIMONY OXIDE: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (USD MILLION)

7.4 BROMINATED FLAME RETARDANTS

7.4.1 HIGHER COST-EFFICIENCY TO DRIVE DEMAND

TABLE 32 BROMINATED: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (KILOTON)

TABLE 33 BROMINATED: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (KILOTON)

TABLE 34 BROMINATED: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 35 BROMINATED: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (USD MILLION)

7.5 CHLORINATED FLAME RETARDANTS

7.5.1 ASIA PACIFIC TO BE FASTEST-GROWING MARKET FOR CHLORINATED FLAME RETARDANTS

TABLE 36 CHLORINATED: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (KILOTON)

TABLE 37 CHLORINATED: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (KILOTON)

TABLE 38 CHLORINATED: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 39 CHLORINATED: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (USD MILLION)

7.6 PHOSPHORUS FLAME RETARDANTS

7.6.1 LOW VOLATILITY OF PHOSPHORUS FLAME RETARDANTS TO FUEL DEMAND

TABLE 40 PHOSPHORUS: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (KILOTON)

TABLE 41 PHOSPHORUS: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (KILOTON)

TABLE 42 PHOSPHORUS FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 43 PHOSPHORUS: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (USD MILLION)

7.7 NITROGEN FLAME RETARDANTS

7.7.1 SHIFT TOWARD NON-HALOGENATED FLAME RETARDANTS TO DRIVE

MARKET

TABLE 44 NITROGEN: FLAME RETARDANTS MARKET, BY REGION, 2017–2021
(KILOTON)

TABLE 45 NITROGEN: FLAME RETARDANTS MARKET, BY REGION, 2022–2028
(KILOTON)

TABLE 46 NITROGEN FLAME RETARDANTS MARKET, BY REGION, 2017–2021
(USD MILLION)

TABLE 47 NITROGEN: FLAME RETARDANTS MARKET, BY REGION, 2022–2028
(USD MILLION)

7.8 OTHERS

7.8.1 ZINC BORATE

7.8.2 MAGNESIUM HYDROXIDE

7.8.3 BORON FLAME RETARDANTS

TABLE 48 OTHERS: FLAME RETARDANTS MARKET, BY REGION, 2017–2021
(KILOTON)

TABLE 49 OTHERS: FLAME RETARDANTS MARKET, BY REGION, 2022–2028
(KILOTON)

TABLE 50 OTHERS: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (USD
MILLION)

TABLE 51 OTHERS: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (USD
MILLION)

8 FLAME RETARDANTS MARKET, BY APPLICATION

8.1 INTRODUCTION

TABLE 52 FLAME RETARDANTS MARKET, BY APPLICATION, 2017–2021
(KILOTON)

TABLE 53 FLAME RETARDANTS MARKET, BY APPLICATION, 2022–2028
(KILOTON)

TABLE 54 FLAME RETARDANTS MARKET, BY APPLICATION, 2017–2021 (USD
MILLION)

TABLE 55 FLAME RETARDANTS MARKET, BY APPLICATION, 2022–2028 (USD
MILLION)

8.2 EPOXY

8.3 UNSATURATED POLYESTER (UPE)

8.4 POLYOLEFIN

8.5 POLYVINYL CHLORIDE (PVC)

8.6 ABS & BLENDS

8.7 POLYSTYRENE (PS)

8.8 POLYURETHANE (PU)

9 FLAME RETARDANTS MARKET, BY END-USE INDUSTRY

9.1 INTRODUCTION

FIGURE 37 BUILDING & CONSTRUCTION TO BE LARGEST END-USE INDUSTRY IN FLAME RETARDANTS MARKET

TABLE 56 FLAME RETARDANTS MARKET, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 57 FLAME RETARDANTS MARKET, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 58 FLAME RETARDANTS MARKET, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 59 FLAME RETARDANTS MARKET, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

9.2 BUILDING & CONSTRUCTION

9.2.1 STRINGENT FIRE SAFETY REGULATIONS TO DRIVE MARKET

TABLE 60 BUILDING & CONSTRUCTION: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (KILOTON)

TABLE 61 BUILDING & CONSTRUCTION: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (KILOTON)

TABLE 62 BUILDING & CONSTRUCTION: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 63 BUILDING & CONSTRUCTION: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (USD MILLION)

9.3 ELECTRONICS & APPLIANCES

9.3.1 GROWING USE OF PLASTIC PARTS TO DRIVE DEMAND FOR FLAME RETARDANTS

TABLE 64 ELECTRONICS & APPLIANCES: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (KILOTON)

TABLE 65 ELECTRONICS & APPLIANCES: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (KILOTON)

TABLE 66 ELECTRONICS & APPLIANCES: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 67 ELECTRONICS & APPLIANCES: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (USD MILLION)

9.4 AUTOMOTIVE & TRANSPORTATION

9.4.1 STRICT MONITORING OF FIRE SAFETY REQUIREMENTS TO DRIVE MARKET

TABLE 68 AUTOMOTIVE & TRANSPORTATION: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (KILOTON)

TABLE 69 AUTOMOTIVE & TRANSPORTATION: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (KILOTON)

TABLE 70 AUTOMOTIVE & TRANSPORTATION: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 71 AUTOMOTIVE & TRANSPORTATION: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (USD MILLION)

9.5 WIRES & CABLES

9.5.1 GROWING DEMAND FOR ELECTRONICS AND CONSUMER GOODS TO FUEL MARKET GROWTH

TABLE 72 WIRES & CABLES: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (KILOTON)

TABLE 73 WIRES & CABLES: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (KILOTON)

TABLE 74 WIRES & CABLES: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 75 WIRES & CABLES: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (USD MILLION)

9.6 TEXTILES

9.6.1 INCREASING AWARENESS OF FIRE SAFETY TO DRIVE MARKET

TABLE 76 TEXTILES: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (KILOTON)

TABLE 77 TEXTILES: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (KILOTON)

TABLE 78 TEXTILES: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 79 TEXTILES: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (USD MILLION)

9.7 OTHERS

TABLE 80 OTHERS: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (KILOTON)

TABLE 81 OTHERS: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (KILOTON)

TABLE 82 OTHERS: FLAME RETARDANTS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 83 OTHERS: FLAME RETARDANTS MARKET, BY REGION, 2022–2028 (USD MILLION)

10 FLAME RETARDANTS MARKET, BY REGION

10.1 INTRODUCTION

FIGURE 38 ASIA PACIFIC TO BE LARGEST FLAME RETARDANTS MARKET DURING FORECAST PERIOD

TABLE 84 FLAME RETARDANTS MARKET SIZE, BY REGION, 2017–2021 (KILOTON)

TABLE 85 FLAME RETARDANTS MARKET SIZE, BY REGION, 2022–2028 (KILOTON)

TABLE 86 FLAME RETARDANTS MARKET SIZE, BY REGION, 2017–2021 (USD MILLION)

TABLE 87 FLAME RETARDANTS MARKET SIZE, BY REGION, 2022–2028 (USD MILLION)

10.2 ASIA PACIFIC

FIGURE 39 ASIA PACIFIC: FLAME RETARDANTS MARKET SNAPSHOT

10.2.1 RECESSION IMPACT

10.2.2 ASIA PACIFIC FLAME RETARDANTS MARKET SIZE, BY TYPE

TABLE 88 ASIA PACIFIC: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2017–2021 (KILOTON)

TABLE 89 ASIA PACIFIC: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2022–2028 (KILOTON)

TABLE 90 ASIA PACIFIC: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2017–2021 (USD MILLION)

TABLE 91 ASIA PACIFIC: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2022–2028 (USD MILLION)

10.2.3 ASIA PACIFIC FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY

TABLE 92 ASIA PACIFIC: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 93 ASIA PACIFIC: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 94 ASIA PACIFIC: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 95 ASIA PACIFIC: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.2.4 ASIA PACIFIC FLAME RETARDANTS MARKET SIZE, BY COUNTRY

TABLE 96 ASIA PACIFIC: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2017–2021 (KILOTON)

TABLE 97 ASIA PACIFIC: FLAME RETARDANTS MARKET SIZE, BY COUNTRY,

2022–2028 (KILOTON)

TABLE 98 ASIA PACIFIC: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 99 ASIA PACIFIC: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2022–2028 (USD MILLION)

10.2.4.1 China

10.2.4.1.1 Growing industrial activities to drive market

TABLE 100 CHINA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 101 CHINA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 102 CHINA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 103 CHINA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.2.4.2 Japan

10.2.4.2.1 Electronics sector to drive demand for flame retardants

TABLE 104 JAPAN: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 105 JAPAN: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 106 JAPAN: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 107 JAPAN: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.2.4.3 India

10.2.4.3.1 Rising industrialization to fuel market growth

TABLE 108 INDIA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 109 INDIA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 110 INDIA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 111 INDIA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.2.4.4 South Korea

10.2.4.4.1 Growing electronics sector to support market growth

TABLE 112 SOUTH KOREA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 113 SOUTH KOREA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 114 SOUTH KOREA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 115 SOUTH KOREA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.3 NORTH AMERICA

FIGURE 40 NORTH AMERICA: FLAME RETARDANTS MARKET SNAPSHOT

10.3.1 RECESSION IMPACT

10.3.2 NORTH AMERICA FLAME RETARDANTS MARKET SIZE, BY TYPE

TABLE 116 NORTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2017–2021 (KILOTON)

TABLE 117 NORTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2022–2028 (KILOTON)

TABLE 118 NORTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2017–2021 (USD MILLION)

TABLE 119 NORTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2022–2028 (USD MILLION)

10.3.3 NORTH AMERICA FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY

TABLE 120 NORTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 121 NORTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 122 NORTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 123 NORTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.3.4 NORTH AMERICA FLAME RETARDANTS MARKET SIZE, BY COUNTRY

TABLE 124 NORTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2017–2021 (KILOTON)

TABLE 125 NORTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2022–2028 (KILOTON)

TABLE 126 NORTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 127 NORTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2022–2028 (USD MILLION)

10.3.4.1 US

10.3.4.1.1 Stringent fire safety regulations to drive market

TABLE 128 US: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 129 US: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 130 US: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 131 US: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.3.4.2 Canada

10.3.4.2.1 Automotive industry to boost demand for flame retardants

TABLE 132 CANADA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 133 CANADA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 134 CANADA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 135 CANADA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.3.4.3 Mexico

10.3.4.3.1 Rising industrialization to contribute to market growth

TABLE 136 MEXICO: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 137 MEXICO: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 138 MEXICO: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 139 MEXICO: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.4 WESTERN EUROPE

FIGURE 41 WESTERN EUROPE: FLAME RETARDANTS MARKET SNAPSHOT

10.4.1 RECESSION IMPACT

10.4.2 WESTERN EUROPE FLAME RETARDANTS MARKET SIZE, BY TYPE

TABLE 140 WESTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2017–2021 (KILOTON)

TABLE 141 WESTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2022–2028 (KILOTON)

TABLE 142 WESTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2017–2021 (USD MILLION)

TABLE 143 WESTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY TYPE,

2022–2028 (USD MILLION)

10.4.3 WESTERN EUROPE FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY

TABLE 144 WESTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 145 WESTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 146 WESTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 147 WESTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.4.4 WESTERN EUROPE FLAME RETARDANTS MARKET SIZE, BY COUNTRY

TABLE 148 WESTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2017–2021 (KILOTON)

TABLE 149 WESTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2022–2028 (KILOTON)

TABLE 150 WESTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 151 WESTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2022–2028 (USD MILLION)

10.4.4.1 Germany

10.4.4.1.1 Developed automotive & transportation sector propelling demand

TABLE 152 GERMANY: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 153 GERMANY: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 154 GERMANY: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 155 GERMANY: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.4.4.2 France

10.4.4.2.1 Economic growth to fuel demand for flame retardants

TABLE 156 FRANCE: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 157 FRANCE: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 158 FRANCE: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 159 FRANCE: FLAME RETARDANTS MARKET SIZE, BY END-USE

INDUSTRY, 2022–2028 (USD MILLION)**10.4.4.3 Italy****10.4.4.3.1 Growth of automotive sector propelling market****TABLE 160 ITALY: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)****TABLE 161 ITALY: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)****TABLE 162 ITALY: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)****TABLE 163 ITALY: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)****10.4.4.4 UK****10.4.4.4.1 Growth in automotive and construction industries driving demand for flame retardants****TABLE 164 UK: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)****TABLE 165 UK: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)****TABLE 166 UK: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)****TABLE 167 UK: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)****10.4.4.5 Spain****10.4.4.5.1 Rising demand from automotive industry to fuel market growth****TABLE 168 SPAIN: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)****TABLE 169 SPAIN: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)****TABLE 170 SPAIN: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)****TABLE 171 SPAIN: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)****10.5 CENTRAL & EASTERN EUROPE****10.5.1 RECESSION IMPACT****10.5.2 CENTRAL & EASTERN EUROPE FLAME RETARDANTS MARKET SIZE, BY TYPE****TABLE 172 CENTRAL & EASTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2017–2021 (KILOTON)****TABLE 173 CENTRAL & EASTERN EUROPE: FLAME RETARDANTS MARKET SIZE,**

BY TYPE, 2022–2028 (KILOTON)

TABLE 174 CENTRAL & EASTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2017–2021 (USD MILLION)

TABLE 175 CENTRAL & EASTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2022–2028 (USD MILLION)

10.5.3 CENTRAL & EASTERN EUROPE FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY

TABLE 176 CENTRAL & EASTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 177 CENTRAL & EASTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 178 CENTRAL & EASTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 179 CENTRAL & EASTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.5.4 CENTRAL & EASTERN EUROPE FLAME RETARDANTS MARKET SIZE, BY COUNTRY

TABLE 180 CENTRAL & EASTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2017–2021 (KILOTON)

TABLE 181 CENTRAL & EASTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2022–2028 (KILOTON)

TABLE 182 CENTRAL & EASTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 183 CENTRAL & EASTERN EUROPE: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2022–2028 (USD MILLION)

10.5.4.1 Russia

10.5.4.1.1 Growing construction activities to drive market

TABLE 184 RUSSIA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 185 RUSSIA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 186 RUSSIA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 187 RUSSIA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.5.4.2 Turkey

10.5.4.2.1 Stringent regulations for fire safety to positively influence market growth

TABLE 188 TURKEY: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 189 TURKEY: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 190 TURKEY: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 191 TURKEY: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.6 MIDDLE EAST & AFRICA

10.6.1 RECESSION IMPACT

10.6.2 MIDDLE EAST & AFRICA FLAME RETARDANTS MARKET SIZE, BY TYPE

TABLE 192 MIDDLE EAST & AFRICA: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2017–2021 (KILOTON)

TABLE 193 MIDDLE EAST & AFRICA: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2022–2028 (KILOTON)

TABLE 194 MIDDLE EAST & AFRICA: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2017–2021 (USD MILLION)

TABLE 195 MIDDLE EAST & AFRICA: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2022–2028 (USD MILLION)

10.6.3 MIDDLE EAST & AFRICA FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY

TABLE 196 MIDDLE EAST & AFRICA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 197 MIDDLE EAST & AFRICA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 198 MIDDLE EAST & AFRICA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 199 MIDDLE EAST & AFRICA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.6.4 MIDDLE EAST & AFRICA FLAME RETARDANTS MARKET SIZE, BY COUNTRY

TABLE 200 MIDDLE EAST & AFRICA: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2017–2021 (KILOTON)

TABLE 201 MIDDLE EAST & AFRICA: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2022–2028 (KILOTON)

TABLE 202 MIDDLE EAST & AFRICA: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 203 MIDDLE EAST & AFRICA: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2022–2028 (USD MILLION)

10.6.4.1 Saudi Arabia

10.6.4.1.1 Growing investments in manufacturing sector to drive market

TABLE 204 SAUDI ARABIA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 205 SAUDI ARABIA: FLAME RETARDANTS MARKET SIZE, END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 206 SAUDI ARABIA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 207 SAUDI ARABIA: FLAME RETARDANTS MARKET SIZE, END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.6.4.2 Israel

10.6.4.2.1 Growth in real estate and infrastructure projects to support market growth

TABLE 208 ISRAEL: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 209 ISRAEL: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 210 ISRAEL: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 211 ISRAEL: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.7 SOUTH AMERICA

10.7.1 RECESSION IMPACT

10.7.2 SOUTH AMERICA FLAME RETARDANTS MARKET SIZE, BY TYPE

TABLE 212 SOUTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2017–2021 (KILOTON)

TABLE 213 SOUTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2022–2028 (KILOTON)

TABLE 214 SOUTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2017–2021 (USD MILLION)

TABLE 215 SOUTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY TYPE, 2022–2028 (USD MILLION)

10.7.3 SOUTH AMERICA FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY

TABLE 216 SOUTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 217 SOUTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 218 SOUTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 219 SOUTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.7.4 SOUTH AMERICA FLAME RETARDANTS MARKET SIZE, BY COUNTRY
TABLE 220 SOUTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2017–2021 (KILOTON)

TABLE 221 SOUTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2022–2028 (KILOTON)

TABLE 222 SOUTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 223 SOUTH AMERICA: FLAME RETARDANTS MARKET SIZE, BY COUNTRY, 2022–2028 (USD MILLION)

10.7.4.1 Brazil

10.7.4.1.1 Growing economy to contribute to flame retardants market growth

TABLE 224 BRAZIL: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 225 BRAZIL: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 226 BRAZIL: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 227 BRAZIL: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

10.7.4.2 Argentina

10.7.4.2.1 Rising vehicle sales likely to spur market growth

TABLE 228 ARGENTINA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (KILOTON)

TABLE 229 ARGENTINA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (KILOTON)

TABLE 230 ARGENTINA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2017–2021 (USD MILLION)

TABLE 231 ARGENTINA: FLAME RETARDANTS MARKET SIZE, BY END-USE INDUSTRY, 2022–2028 (USD MILLION)

11 COMPETITIVE LANDSCAPE

11.1 INTRODUCTION

11.2 STRATEGIES ADOPTED BY KEY PLAYERS

TABLE 232 OVERVIEW OF STRATEGIES ADOPTED BY KEY FLAME RETARDANT MANUFACTURERS

11.3 RANKING OF KEY MARKET PLAYERS

FIGURE 42 RANKING OF TOP FIVE PLAYERS IN FLAME RETARDANTS MARKET, 2022

11.4 MARKET SHARE ANALYSIS

TABLE 233 FLAME RETARDANTS MARKET: DEGREE OF COMPETITION

FIGURE 43 ALBEMARLE CORPORATION LED FLAME RETARDANTS MARKET IN 2022

11.5 REVENUE ANALYSIS OF TOP FIVE PLAYERS

FIGURE 44 REVENUE ANALYSIS OF KEY COMPANIES (2018–2022)

11.6 COMPANY EVALUATION MATRIX (TIER 1)

11.6.1 STARS

11.6.2 EMERGING LEADERS

11.6.3 PERVASIVE PLAYERS

11.6.4 PARTICIPANTS

FIGURE 45 COMPANY EVALUATION MATRIX FOR FLAME RETARDANTS MARKET (TIER 1)

11.6.5 COMPANY FOOTPRINT

FIGURE 46 FLAME RETARDANTS MARKET: COMPANY OVERALL FOOTPRINT

TABLE 234 FLAME RETARDANTS MARKET: TYPE FOOTPRINT

TABLE 235 FLAME RETARDANTS MARKET: END-USE INDUSTRY FOOTPRINT

TABLE 236 FLAME RETARDANTS MARKET: COMPANY REGION FOOTPRINT

11.7 START-UP/SME EVALUATION MATRIX

11.7.1 PROGRESSIVE COMPANIES

11.7.2 RESPONSIVE COMPANIES

11.7.3 DYNAMIC COMPANIES

11.7.4 STARTING BLOCKS

FIGURE 47 START-UP/SME EVALUATION MATRIX FOR FLAME RETARDANTS MARKET

11.7.5 COMPETITIVE BENCHMARKING

TABLE 237 FLAME RETARDANTS MARKET: COMPETITIVE BENCHMARKING OF KEY START-UPS/SMES

TABLE 238 FLAME RETARDANTS MARKET: DETAILED LIST OF KEY START-UPS/SMES

11.8 COMPETITIVE SITUATION AND TRENDS

11.8.1 PRODUCT LAUNCHES

TABLE 239 FLAME RETARDANTS MARKET: PRODUCT LAUNCHES (2019–2022)

11.8.2 DEALS

TABLE 240 FLAME RETARDANTS MARKET: DEALS (2019–2022)

11.8.3 OTHER DEVELOPMENTS

TABLE 241 FLAME RETARDANTS MARKET: OTHER DEVELOPMENTS (2019–2022)

12 COMPANY PROFILES

(Business overview, Products offered, Recent Developments, Product launches, Deals, Other developments, MnM view, Key strengths, Strategic choices, Weaknesses and competitive threats)*

12.1 MAJOR PLAYERS

12.1.1 ALBEMARLE CORPORATION

TABLE 242 ALBEMARLE CORPORATION: COMPANY OVERVIEW

FIGURE 48 ALBEMARLE CORPORATION: COMPANY SNAPSHOT

12.1.2 CLARIANT AG

TABLE 243 CLARIANT AG: COMPANY OVERVIEW

FIGURE 49 CLARIANT AG: COMPANY SNAPSHOT

12.1.3 LANXESS AG

TABLE 244 LANXESS AG: COMPANY OVERVIEW

FIGURE 50 LANXESS AG: COMPANY SNAPSHOT

12.1.4 BASF SE

TABLE 245 BASF SE: COMPANY OVERVIEW

FIGURE 51 BASF SE: COMPANY SNAPSHOT

12.1.5 ISRAEL CHEMICALS GROUP LTD.

TABLE 246 ISRAEL CHEMICALS GROUP LTD.: COMPANY OVERVIEW

FIGURE 52 ICL GROUP LTD.: COMPANY SNAPSHOT

12.1.6 ADEKA CORPORATION

TABLE 247 ADEKA CORPORATION: COMPANY OVERVIEW

FIGURE 53 ADEKA CORPORATION: COMPANY SNAPSHOT

12.1.7 NABALTEC AG

TABLE 248 NABALTEC AG: COMPANY OVERVIEW

FIGURE 54 NABALTEC AG: COMPANY SNAPSHOT

12.1.8 HUBER ENGINEERED MATERIALS

TABLE 249 HUBER ENGINEERED MATERIALS: COMPANY OVERVIEW

12.1.9 ITALMATCH CHEMICALS S.P.A.

TABLE 250 ITALMATCH CHEMICALS S.P.A.: COMPANY OVERVIEW

FIGURE 55 ITALMATCH CHEMICALS S.P.A.: COMPANY SNAPSHOT

12.1.10 AVIENT CORPORATION

TABLE 251 AVIENT CORPORATION: COMPANY OVERVIEW

FIGURE 56 AVIENT CORPORATION: COMPANY SNAPSHOT

*Details on Business overview, Products offered, Recent Developments, Product launches, Deals, Other developments, MnM view, Key strengths, Strategic choices, Weaknesses and competitive threats might not be captured in case of unlisted companies.

12.2 OTHER KEY PLAYERS

- 12.2.1 BUDENHEIM CHEMICALS KG
- TABLE 252 BUDENHEIM CHEMICALS KG: COMPANY OVERVIEW
- 12.2.2 GREENCHEMICALS S.R.L.
- TABLE 253 GREENCHEMICALS S.R.L.: COMPANY OVERVIEW
- 12.2.3 STAHL HOLDINGS B.V.
- TABLE 254 STAHL HOLDINGS B.V.: COMPANY OVERVIEW
- 12.2.4 GULEC CHEMICALS GMBH
- TABLE 255 GULEC CHEMICALS GMBH: COMPANY OVERVIEW
- 12.2.5 OTSUKA CHEMICAL CO., LTD.
- TABLE 256 OTSUKA CHEMICAL CO., LTD.: COMPANY OVERVIEW
- 12.2.6 KISUMA CHEMICALS
- TABLE 257 KISUMA CHEMICALS: COMPANY OVERVIEW
- 12.2.7 AMFINE CHEMICAL CORPORATION
- TABLE 258 AMFINE CHEMICAL CORPORATION: COMPANY OVERVIEW
- 12.2.8 THOR COMPANY
- TABLE 259 THOR COMPANY: COMPANY OVERVIEW
- 12.2.9 FRX POLYMERS, INC.
- TABLE 260 FRX POLYMERS, INC.: COMPANY OVERVIEW
- 12.2.10 AXIPOLYMER INCORPORATION
- TABLE 261 AXIPOLYMER INCORPORATION: COMPANY OVERVIEW
- 12.2.11 DONGYING JINGDONG CHEMICAL CO., LTD.
- TABLE 262 DONGYING JINGDONG CHEMICAL CO., LTD.: COMPANY OVERVIEW
- 12.2.12 QINGDAO FUNDCHEM CO., LTD.
- TABLE 263 QINGDAO FUNDCHEM CO., LTD.: COMPANY OVERVIEW
- 12.2.13 SMC GLOBAL
- TABLE 264 SMC GLOBAL: COMPANY OVERVIEW
- 12.2.14 CENTURY MULTECH, INC.
- TABLE 265 CENTURY MULTECH, INC.: COMPANY OVERVIEW
- 12.2.15 PRESAFER (QINGYUAN) PHOSPHOR CHEMICAL CO., LTD.
- TABLE 266 PRESAFER (QINGYUAN) PHOSPHOR CHEMICAL CO., LTD.: COMPANY OVERVIEW

13 ADJACENT & RELATED MARKETS

- 13.1 INTRODUCTION
- 13.2 LIMITATION
- 13.3 PLASTIC ADDITIVES MARKET
 - 13.3.1 MARKET DEFINITION
 - 13.3.2 MARKET OVERVIEW

13.4 PLASTIC ADDITIVES MARKET, BY REGION

TABLE 267 PLASTIC ADDITIVES MARKET SIZE, BY REGION, 2016–2021
(KILOTON)

TABLE 268 PLASTIC ADDITIVES MARKET SIZE, BY REGION, 2022–2028
(KILOTON)

TABLE 269 PLASTIC ADDITIVES MARKET SIZE, BY REGION, 2016–2021 (USD
MILLION)

TABLE 270 PLASTIC ADDITIVES MARKET SIZE, BY REGION, 2022–2028 (USD
MILLION)

13.4.1 NORTH AMERICA

TABLE 271 NORTH AMERICA: PLASTIC ADDITIVES MARKET SIZE, BY COUNTRY,
2016–2021 (KILOTON)

TABLE 272 NORTH AMERICA: PLASTIC ADDITIVES MARKET SIZE, BY COUNTRY,
2022–2028 (KILOTON)

TABLE 273 NORTH AMERICA: PLASTIC ADDITIVES MARKET SIZE, BY COUNTRY,
2016–2021 (USD MILLION)

TABLE 274 NORTH AMERICA: PLASTIC ADDITIVES MARKET SIZE, BY COUNTRY,
2022–2028 (USD MILLION)

13.4.2 EUROPE

TABLE 275 EUROPE: PLASTIC ADDITIVES MARKET SIZE, BY COUNTRY,
2016–2021 (KILOTON)

TABLE 276 EUROPE: PLASTIC ADDITIVES MARKET SIZE, BY COUNTRY,
2022–2028 (KILOTON)

TABLE 277 EUROPE: PLASTIC ADDITIVES MARKET SIZE, BY COUNTRY,
2016–2021 (USD MILLION)

TABLE 278 EUROPE: PLASTIC ADDITIVES MARKET SIZE, BY COUNTRY,
2022–2028 (USD MILLION)

13.4.3 ASIA PACIFIC

TABLE 279 ASIA PACIFIC: PLASTIC ADDITIVES MARKET SIZE, BY COUNTRY,
2016–2021 (KILOTON)

TABLE 280 ASIA PACIFIC: PLASTIC ADDITIVES MARKET SIZE, BY COUNTRY,
2022–2028 (KILOTON)

TABLE 281 ASIA PACIFIC: PLASTIC ADDITIVES MARKET SIZE, BY COUNTRY,
2016–2021 (USD MILLION)

TABLE 282 ASIA PACIFIC: PLASTIC ADDITIVES MARKET SIZE, BY COUNTRY,
2022–2028 (USD MILLION)

14 APPENDIX

14.1 DISCUSSION GUIDE

14.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

14.3 CUSTOMIZATION OPTIONS

14.4 RELATED REPORTS

14.5 AUTHOR DETAILS

About

Growing Demand from End-user Industries

Wire and cable is one of the important application markets for flame retardant. Growth of this end-user industry is critical for the growth of flame retardant chemical market.

Wire and cable market is expected to witness a significant demand growth in the near future driven by rapid expansion in the wind energy, nuclear energy, and other green energy sectors.

Growing demand for wire & cable will stem from rapid expansion of information processing and communications sector. This is expected to trigger the demand for flame retardants.

Telecommunications, data wire & cable category occupied the largest chunk of the global insulated wire and cable market. Further, ever increasing adoption of the internet also triggered the market for telecommunications, data wire & cable across the world.

Power and wire & cable represented another growth market in the global insulated wire & cable market.

All these advancements in wire & cable industries are expected to result in growing demand for flame retardants.

Raw Material Analysis

Bromine production is growing steadily across the world and its price is estimated to double within short time span from 2014 to 2019.

This price rise is a result of growing demand throughout the world, especially in China. Since 2013, prices have risen from \$XX per ton in 2013 to over \$XX per ton in 2014.

Currently, bromine prices continued to rise and are expected to grow further in the coming years due to its use in wide range of applications.

These fluctuations in raw material prices, have greatly affected the downstream business including flame retardant chemicals industry. It is expected that bromine prices

will reach \$XX per metric ton by 2019, at a CAGR of XX% from 2014 to 2019.

Price Analysis

Flame retardant chemicals are not standardized products; these are in various types and used in numerous applications. Prices vary with the type of flame retardant chemicals, and its applications.

It is thus difficult to generalize flame retardant chemicals and estimate its prices; the following table compares the average prices of major types of flame retardant chemicals including aluminum trihydrate, antimony oxides, brominated compounds, chlorinated compounds, and organophosphorus compounds.

Prices of flame retardant chemicals are driven by the raw materials prices. Supply constraints play major role in deriving flame retardant chemicals prices. For instance, phosphorus is an important input used in manufacturing of organophosphate compounds.

However, XX% of phosphorus produced globally is consumed by agrochemicals industry. Moreover, phosphorus manufacturing activities are concentrated in few major countries including China, the U.S., Morocco, Russia, and Tunisia. Due to this, manufacturers face difficulties in procurement of raw materials which in-turn reflect in the pricing of the flame retardant chemicals.

This graph summarizes prices of major flame retardant chemicals. Price of different flame retardant chemicals varies with grade and quality; and thus it is difficult to estimate an average price of flame retardant chemicals.

Because of its special properties antimony oxides, brominated and organophosphorus compounds are costlier as compared to aluminum trihydrate.

Prices of the flame retardant chemicals are expected to increase marginally from 2014 to 2019.

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